EXPERTISE YOU CAN TRUST
HIRSLANDEN PRIVATE HOSPITAL GROUP
I. The Hirslanden Private Hospital Group
II. The Swiss public healthcare system
III. Hirslanden’s fields of competence
IV. Hirslanden’s community involvement
I. THE HIRSLANDEN PRIVATE HOSPITAL GROUP
WE WILL BE RESPECTED THROUGHOUT SWITZERLAND.

Because we deliver measurable top-quality medical outcomes, and concentrate all our activities on the needs of our patients. As the biggest provider of medical services, we unite all the relevant medical areas and the best doctors under one roof. All our activities are characterised by responsibility and sustainability. We thus guarantee long-term growth in Switzerland, and contribute towards Mediclinic International’s continuing growth as a successful international healthcare group.

WE WILL BE PREFERRED LOCALLY.

Because we deliver excellent patient care, our hospitals are firmly anchored in the local communities, and as an employer of choice we are able to provide qualified and loyal staff with professional challenge and development. We ensure aligned relationships with doctor communities, and build constructive relationships with all stakeholders.
### Key Figures 2016/17

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospitals</td>
<td>16 in 11 Cantons</td>
</tr>
<tr>
<td>Affiliated Doctors</td>
<td>1 708</td>
</tr>
<tr>
<td>Employees</td>
<td>9 402</td>
</tr>
<tr>
<td>Patients¹</td>
<td>100 293</td>
</tr>
<tr>
<td>Patient days¹,²</td>
<td>466 025</td>
</tr>
<tr>
<td>Newborns</td>
<td>5 925</td>
</tr>
<tr>
<td>Length of stay³</td>
<td>4.6 days</td>
</tr>
<tr>
<td>Turnover</td>
<td>CHF 1 704 m</td>
</tr>
</tbody>
</table>

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**Key Figures as of 31 March 2017:** ¹ Inpatient admissions, without newborns  / ² Adult and maternity patients, source H+ / ³ Average in days, source H+
AT A GLANCE

Basic: 45%
Semi-private: 31%
Private: 24%
16 HOSPITALS BETWEEN CONSTANCE AND LAKE GENEVA
MEDICAL NETWORK

16 Hospitals
Aarau
Bern
Cham Zug
Geneva
Heiden
Lausanne
Lucerne
Meggen
Basle Münchenstein
Schaffhausen
St. Gallen
Düdingen
Lucerne
Bern
Schaffhausen
Düdingen

4 Outpatient clinics
Aarau
Bern
Schaffhausen
Lausanne
Lucerne
Basle Münchenstein
St. Gallen
Düdingen

14 Radiology institutes
Aarau
Bern (2)
Düdingen
Lausanne (3)
Lucerne (2)
Basle Münchenstein
St. Gallen
Zurich (3)

4 Radiotherapy institutes
Aarau
Lausanne
Männerdorf
Zurich
GROWTH AT HIRSLANDEN 1/2

**TURNOVER** (in CHFm)

<table>
<thead>
<tr>
<th>Year</th>
<th>Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/09</td>
<td>1,091</td>
</tr>
<tr>
<td>09/10</td>
<td>1,134</td>
</tr>
<tr>
<td>10/11</td>
<td>1,218</td>
</tr>
<tr>
<td>11/12</td>
<td>1,270</td>
</tr>
<tr>
<td>12/13</td>
<td>1,314</td>
</tr>
<tr>
<td>13/14</td>
<td>1,437</td>
</tr>
<tr>
<td>14/15</td>
<td>1,563</td>
</tr>
<tr>
<td>15/16</td>
<td>1,647</td>
</tr>
<tr>
<td>16/17</td>
<td>1,704</td>
</tr>
</tbody>
</table>

CAGR: 5.7%

**EMPLOYEES** (FTE, including employed doctors)

<table>
<thead>
<tr>
<th>Year</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/09</td>
<td>4,166</td>
</tr>
<tr>
<td>09/10</td>
<td>4,343</td>
</tr>
<tr>
<td>10/11</td>
<td>4,576</td>
</tr>
<tr>
<td>11/12</td>
<td>4,871</td>
</tr>
<tr>
<td>12/13</td>
<td>5,065</td>
</tr>
<tr>
<td>13/14</td>
<td>5,530</td>
</tr>
<tr>
<td>14/15</td>
<td>6,213</td>
</tr>
<tr>
<td>15/16</td>
<td>6,573</td>
</tr>
<tr>
<td>16/17</td>
<td>6,722</td>
</tr>
</tbody>
</table>

CAGR: 6.2%

CAGR: Compound Annual Growth Rate; Key figures as of 31 March 2017
GROWTH AT HIRSLANDEN 2/2

PATIENTS (inpatient cases)

PATIENT DAYS

CAGR: 4.0%

CAGR: 3.3%

28.06.2017
• In summer 2017 The Hirslanden Private Hospital Group is publishing its annual comprehensive quality report for the eighth time

• This underlines our desire for transparency and quality leadership

• Hirslanden sees quality management as a relevant element of the corporate strategy and deliberately faces up to discussions on quality

• Hirslanden consistently uses result indicators for continuous improvement processes at the hospitals
QUALITY AT HIRSLANDEN

EXCELLENCE

Management quality

ISO +

Business Excellence

EFQM

EVOLUTION

Process quality

ISO

Product quality

KISS, CIRS, IQIP, Picker

KISS
Hospital Infection Surveillance System

CIRS
Critical Incident Reporting System

IQIP
International Quality Indicator Project

Picker
Patient Satisfaction Survey

ISO
International Organization for Standardization

EFQM
European Foundation of Quality Management

28.06.2017
II. THE SWISS PUBLIC HEALTHCARE SYSTEM
THE SWISS PUBLIC HEALTH SECTOR NUMBERS, DATA, FACTS

• Third place for health expenditure in OECD countries (GDP per capita in US$, PPP).
• Long hospital stays in acute hospitals
• High density of doctors and nursing staff.
• High quality output:
  • No waiting lists
  • One of the highest life expectancies anywhere in the world\(^1\)
  • Second place out of 191 countries for "overall goal attainment" according to the WHO\(^2\)
  • 7th place out of 139 countries in the parameter "Health/Primary Education" in the WEF World Competitiveness Report 2010/11.
  • However, in-depth transparency with regard to the quality of the medical services

Source: OECD Health Data 2010 (Original 2008), except:
IMPORTANCE OF PRIVATE HOSPITALS

- About 40% of all Swiss hospitals are private
- Around one fifth of all hospital services are provided by private hospitals
- In various cantons private hospitals are essential for basic care
- Private hospitals generate over CHF 4.8 billion turnover per annum
- About 30,000 people work in private hospitals
- According to a survey (Omnibus) 85% of respondents think that the Swiss healthcare system needs a mixture of public AND private hospitals

Data: 2014; Source:
SWISS HOSPITAL MARKET

1/2

**Beds**
Total: 37,636

- HIRSLANDEN: 19% of private hospitals
- 4% of total market
- 76%

**Operating theatres**
Total: 986

- HIRSLANDEN: 33% of private hospitals
- 9% of total market
- 73%

**Staff (HC)**
Total: 191,000

- HIRSLANDEN: 30% of private hospitals
- 4% of total market
- 85%

Source: Verbund Privatkliniken Schweiz: Bericht Privatkliniken Schweiz 2016; Key Figures 2014

28.06.2017
SWISS HOSPITAL MARKET

2/2

Patient days
Total: 12,700,000

Inpatients
Total: 1,376,018

Births
Total: 85,287

HIRSLANDEN
17% of private hospitals
4% of total market

HIRSLANDEN
34% of private hospitals
7% of total market

HIRSLANDEN
37% of private hospitals
7% of total market

Source: Verbund Privatkliniken Schweiz: Bericht Privatkliniken Schweiz 2016; Key Figures 2014

28.06.2017
More competition and national domestic hospital market

**But:** distortion of competition due to collision of interests in the cantons.

Planning for demand on the basis of profitability and quality

**But:** neither price comparisons on the basis of DRG nor across-the-board quality criteria will be available from 2012.

Equality of the public and private service providers (regional planning to include all potential service providers)

**But:** due to their multiple roles, cantons still wrongly stimulated to prefer their own hospitals.

**But:** different payments by the cantons to cover the social economy services makes price transparency impossible.
III. HIRSLANDEN’S FIELDS OF COMPETENCE
HOSPITALS

- **System provider**: all integral medical services are always available for patients
- First-class **medical quality**
- A **network** of specialised institutes and centres
- **Technology leadership**
- Competent care in pleasant **surroundings**
- Each **hospital** has its own character
- Highly qualified **medical** specialists with many years experience
Orthopaedic surgery/Sports medicine
Gynaecology/Obstetrics
Surgery/Visceral surgery
Cardiology
Internal medicine
Neurosurgery
Urology
Heart and thoracic vascular surgery
Angiology/Vascular surgery
Oncology/Haematology
Otorhinolaryngologie (ORL)
Hand surgery
Plastic surgery
Gastroenterology
VERY LATEST TECHNOLOGICAL STANDARD

### Infrastructure

<table>
<thead>
<tr>
<th>Service</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labour suites</td>
<td>23</td>
</tr>
<tr>
<td>Beds intensive care unit</td>
<td>71</td>
</tr>
</tbody>
</table>

### Medical technology infrastructure

<table>
<thead>
<tr>
<th>Service</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>MRI (magnetic resonance tomography)</td>
<td>24</td>
</tr>
<tr>
<td>CT (computed tomography)</td>
<td>14</td>
</tr>
<tr>
<td>Cardiac catheter laboratory</td>
<td>17</td>
</tr>
<tr>
<td>Nuclear medicine</td>
<td>5</td>
</tr>
<tr>
<td>LINAC (linear accelerator, incl. CyberKnife)</td>
<td>6</td>
</tr>
<tr>
<td>Surgical robot</td>
<td>5</td>
</tr>
<tr>
<td>Dialyse units</td>
<td>64</td>
</tr>
</tbody>
</table>

Key Figures as of: 31 March 2017
INTEGRATION OF TECHNOLOGY

Example: Comprehensive Cancer Centre
Integration of technology and competence to achieve the highest possible patient benefit

Patient orientation instead of department orientation
FURTHER SERVICES

CHECK-UP CENTRES

HIRSLANDEN HEALTHLINE
0848 333 999

HIRSLANDEN HOSPITAL GROUP
SWITZERLAND

HIRSLANDEN baby
IV. HIRSLANDEN'S COMMUNITY INVOLVEMENT
HIRSLANDEN'S COMMUNITY INVOLVEMENT

The Hirslanden Private Hospital Group pledges long-term involvement in society and politics as a socially responsible partner and works closely and long-term with various interest groups and institutions.
Hirslanden employs around 730 trainees and students from 30 professions with a high level of education: Swiss Federal Certificate of Competence, professional college, University of Applied Sciences and post-graduate studies.

About 600 trainees and students come from health professions, including around 110 medical assistents who undergo part of their post-graduate training at one of Hirslanden’s hospitals.
THANK YOU VERY MUCH

DR OLE WIESINGER
CEO

HIRSLANDEN
SEEFELDSTRASSE 214
CH-8008 ZÜRICH